

NEW HAMPSHIRE MUNICIPAL TECHNICAL ASSISTANCE GRANT PROGRAM



PLAN NH 56 MIDDLE STREET 2ND FLOOR PORTSMOUTH NH 03801

**New Hampshire Municipal Technical Assistance Grant Program
Program Information and Application Instructions**

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PROGRAM INFORMATION

Introduction

The New Hampshire Municipal Technical Assistance Grant Program (MTAG) provides competitive grants for cities and towns who wish to increase options for places to live for households with changing and/or diverse needs and income levels.

The MTAG is administered by Plan NH, in partnership with New Hampshire Housing, who has provided \$50,000 to Plan NH to fund this first year of the program.

Background to the Municipal Technical Assistance Program

New Hampshire's population is changing dramatically. By 2020, about 20% of us will be age 65 and older. By 2040, that number is expected to climb to 30%¹. At the same time, most communities are seeing fewer young families. Millennials (those born in the 1980's and 1990's) are faced with lower-paying jobs and college debt.

National trends are showing that Millennials want smaller homes, preferably where they can walk to work, services and social connections. Many Boomers (born between 1946 and 1964) are looking for the same thing. But decent places to live that are smaller, energy efficient and either walkable or close to public transportation are rarely affordable, if they are available at all.

Smaller, decent and affordable is only part of the picture for those with mobility and/or sensory challenges. Home design for those who cannot walk or have difficulty seeing, for example, is usually a modification made in response to the situation, rather than planned for the eventuality.

Accessory dwelling units, multi-family homes, co-living, cottages and even tiny houses are some of the desired solutions to the challenge of allowing housing diversity. But in many New Hampshire communities, some or all of these are not allowed. On the other hand, even if zoning and other regulations permit different kinds (and locations) of housing, the permitting and review process can be a barrier to progress.

Changing regulations is challenging. Technical knowledge is often needed, and there must be enough community buy-in to support suggested changes at Town Meeting or at the polls.

Knowing what needs to change- and what the goals are- is a first step.

The MTAG Program's purpose is to provide funds for assistance to those communities that want their ordinances and regulations, as they affect housing, to support the changing and diverse needs of their citizens.

Moreover, facilitating the creation (or adaptation) of a wider range of housing options may support a larger vision or plan the community has (e.g. economic development, downtown revitalization, job creation, more).

¹ from *Housing Needs in New Hampshire*, a three-part study commissioned by New Hampshire Housing and performed by the New Hampshire Center for Public Policy Studies and Applied Economic Research. [Go here](#) for more information.

NOTE: THE MTAG PROGRAM IS NOT FEDERALLY FUNDED AND THEREFORE HAS NO FEDERAL REPORTING REQUIREMENTS

MTAG Program Administration

Plan NH's administration of the MTAG Program will be guided by an advisory Steering Committee that consists of representatives of the Plan NH Board as well as from the following entities:

- New Hampshire Home Builders Association
- New Hampshire Municipal Association
- New Hampshire Office of Energy and Planning
- Transport NH
- UNH Cooperative Extension
- Upper Valley Housing Coalition
- Representatives from two different private engineering firms

This Committee will review municipal grant applications, score them, and make recommendations to Plan NH as to who should receive the grants. Recommendations will be by consensus, and Plan NH reserves final authority over all work products and decisions to be developed or made under MTAG.

The Committee will also advise Plan NH regarding how this program is shaped and conducted going forward.

A representative from New Hampshire Housing will serve in an advisory capacity.

GRANT APPLICATION INFORMATION and CRITERIA

Eligible Applicants

Applicant eligibility is strictly limited to incorporated New Hampshire cities and towns (“municipalities”).

Grant Rounds

There will be one grant round at this time, with the potential for additional grant rounds in 2017.

Important dates

Applications are due electronically by 5 PM on Monday, April 4, 2016. Decisions will be made by mid-May and final agreements will be in place by June 30, 2016. All grant funds must be expended by June 30, 2017.

Grant Awards

Grants will be awarded *on a competitive basis* to communities who demonstrate a need and readiness for their project. Grants will be no less than \$2,500 and no more than \$10,000.

Project funds will need to have been expended by June 30, 2017, and a reasonable effort to propose adoption by the appropriate municipal body is required.

Funds will be disbursed as reimbursements for costs incurred on a monthly or quarterly basis, as determined by the Scope of Work and Grant Acceptance Agreement.

Required Municipal Match

Applicants must demonstrate a cash match commitment of 25% of requested MTAG grant funds. For example, if an applicant requests an MTAG grant of \$10,000 for a project, it must demonstrate a local cash match commitment of \$2,500.

For the purposes of this program, “cash match” is defined as financial contribution toward the total project costs made by the applicant. This may consist of

- direct municipal appropriations contributed by the municipality specifically for the approved scope of work,
- financial gifts, private financial contributions, or grant funds from other sources provided directly to the municipality.

Proof of match (or pledge for funds) must be documented and submitted with the application. It should specify sources of match.

Note that part of the work plan budget requires identifying how/where these funds will be used.

***The 25% cash match amount must be expended
before the final 25% of MTAG funds are allocated***

PURPOSE and USE of GRANT FUNDS

The MTAG Program is a voluntary program that provides competitive grants to municipalities for the development of regulations that lead to increased housing options for households with changing and/or diverse needs and income levels.

In turn, these increased options should support a larger vision or plan which the municipality may have (e.g., economic development) and/or a demonstrated need within the community (e.g. around demographics, income, other).

Grantee municipalities may use MTAG grants to hire qualified consultants, including their regional planning commission, to conduct proposed project work. Documentation of the qualifications of the individual(s) with whom your municipality will be working *must be included in the application*.

A consultant's costs may include time, direct costs associated with the project, and indirect costs reasonably attributable to the project.

Community Engagement

At least 5% of the MTAG funds must support *community outreach and engagement*. Grantees will be required to hold a public listening session at the outset of their grant process and a public hearing at least once prior to adoption of regulatory measures. Throughout the program, grantees will conduct an ongoing outreach and education process to gather input from a broad range of community members, including those who may be most affected by a new ordinance but who may feel they have no voice - as well as those who are traditionally opposed to changes. In addition, community engagement will ensure that the citizenry is fully informed of any proposed ordinance – both its text and the need it addresses.

Funds may be used for surveys. However, sessions or other group discussions where there can be real dialog around this issue are **required**.

NOTE: We recognize that a community engagement process may be new or still-new for many. UNH Cooperative Extension will assist grantees by offering training in community engagement and developing an outreach and engagement plan.

Work is done when ...

1. Project elements are completed and
2. Where new ordinances or regulations are being proposed, a reasonable effort has been made to secure adoption by the appropriate municipal body.

Grant funds may NOT be used ...

- For the acquisition of property.
- To pay for municipal staff or equipment.
- To pay for food, unless food is available to all attendees at a publicly noticed meeting (e.g., a listening session).

POST-GRANT RESPONSIBILITIES

Further Grantee Responsibilities

As a condition of selection as an MTAG Program grantee, municipalities will be required to report (timeline according to Work Plan and Grant Acceptance Agreement) on progress toward implementing their proposed scope of work, completed tasks, and metrics of success including documentation on public meetings, workshops and hearings, public participation levels, and additional outreach efforts. These reports may be included with invoices.

This report should include not only a summary of what has happened/status of achieving a particular goal, but might also include

- What questions are coming up or which have come up that are (still) unanswered?
- Are there areas in which you feel stuck, or that progress is not being made?
- Has anything come up that has surprised you? Or even that you think could have been included in the scope of work?

Some grantees, depending on their project, may be asked to report on the experience and lessons learned at a future meeting or conference where such information may be of interest and/or use.

After the close of the grant period (June 30, 2017), Municipal grantees will be required to submit annual (every June 30) progress reports to Plan NH, reporting on implementation and outcomes, for a period of 5 years after the conclusion of the award period. For example, an MTAG grantee that adopts a co-living ordinance will be required to submit data on the number of times it is used in a 5-year period by development applicants after adoption. (Additional information may be required.)

APPLICATION INSTRUCTIONS

*All components of your application **must be compiled into one PDF file** and sent, via Dropbox, to Plan NH (info@plannh.org) no later than 5 PM on April 4, 2016.*

1. **Cover: ON ONE PAGE**, please include (in this order):
 - a. The name of your municipality and address of town hall or governing body
 - b. Contact person's name, affiliation with community, phone, email
 - c. Four sentences describing your project
 - i. What is the demonstrated plan or need this addresses?
 - ii. What is your intended long-term outcome for which you are seeking funds?
 - iii. How do you plan to achieve that?
 - iv. Why is this proposed project important to your community?
 - d. What is the population of your community (year round/seasonal)?
 - e. What is the median income of your year-round community?
 - f. How old is your Master Plan?
 - g. What section(s) of your current Master Plan would this project support?
 - h. Amount of NH MTAG funding requested.
 - i. Amount of pledged (or actual) cash match (please also ID source of this funding).
 - j. Total funding requested.
 - k. Signature of Chief Executive Officer of municipality who holds fiduciary responsibility – or other representative designated by the governing body – with a note certifying that the information contained in the application is true and complete to the best of the belief of the signatory.

2. **Starting on the next page**, please include a narrative of *no more than three to five pages* that describes your project:
 - a. Describe the (demonstrated) plan or need this project addresses.
 - b. What is the *current* situation (regarding to zoning regulations related to your project) that you intend to address?
 - i. What does it look like, what does it mean for your community members and your community as a whole?
 - ii. How can you confirm that your project is a real need or issue in your community (and not based on assumptions)? For example:
 1. Have you done surveys or other community outreach that shows this need?
 2. Describe if/how this supports relevant portions of your Master Plan. (Vision? Certain sections?)
 3. Would the outcomes of this project have an impact on economic development, transportation investments, job creation or other plan?
 - c. ***What do you want to achieve?***
 - i. What do you want the final outcome to look like for your community members and your community as a whole?

- ii. How will you measure its success?
 - iii. What needs to change to get to that final outcome? (note: is it just, for example, the zoning rule itself, or do your community's attitudes or perceptions need to change as well?)
 - d. What needs to be done to affect the situation(s) in #2a and c? so that your desired outcome is achieved?
 - e. What activities do you intend to undertake to get there? Who will help you in this? (e.g. staff, community partners. Please also include, if applicable, the name of your technical assistance consultant – and don't forget to include a statement of her or his qualifications in your application packet.)
3. On a separate page, please describe how the public will be included in this project in every relevant step of the way, and what you intend to achieve/gain from this. (Include any public outreach which may have already occurred prior to this application – and its consequences/outcomes.)
- (Note that *grantees will receive additional technical assistance to finalize an outreach plan.*)
4. On the next pages, please provide an overall and then step by step **work plan** for your project.

A carefully thought-out work plan is critical to the success of your project:

- It should clearly describe the outcomes the municipality seeks to achieve
- It should define a process to achieve project outcomes
- Creating it will help you think clearly about what you want to achieve and how you will get there.
- During your project, it can help as a checklist of where you are, and a reference to what activities are being done (or are still to be done), when and by whom.
- At any point, the work plan can help you measure your progress and success at achieving short-term and long-term goals or outcomes.
- The work plan will become the basis for periodic reporting of activity

To begin, think about your narrative, especially #2 c-e, above. You have an overall *outcome* to achieve. But to get there, there are multiple *intermediate goals*, and to get to each of those, there are separate steps, each with specific actions, costs, etc.

We have found that starting at the end and working backwards really helps:

EXAMPLE:

Final outcome: Regulations that enable home sharing are in {your community's} zoning ordinances.

Intermediate goals/outcomes needed to achieve (*note these are in backward order. The one you are looking at can only occur if the one below is true.*)

- Proposed ordinance passes
- Proposed ordinance is on the ballot/is brought before the council
- Political will and public will to have this regulation
- Knowledge and buy-in of need and proposed regulation
- Community citizens and leadership engagement/input for
 - Acceptance of ordinance
 - Input into contents of regulations
 - Discussion of need and potential solutions
- Identify and verify need

For each step, or set of activities to achieve an intermediate goal/outcome, you will need to identify:

1. What is the intended (intermediate) goal or outcome?
2. What are the activities, in order, to achieve that?
3. For each activity:
 - a. Who will be responsible (not necessarily who will carry it out (e.g., you may have staff to do some of it), but who is responsible for seeing that it happens?)
 - b. When does this activity occur?
 - c. What will you need to make this happen (staff, equipment, community partners, etc.)?
 - d. What are the costs involved? (e.g., consultant time, printing costs)
 - i. What you're your costs (for your own records) and what costs will be covered by the MTAG funds, the cash-match funds?
 - e. What are the measurable outcomes? (e.g. number of announcements)
 - f. What is the impact or outcome of each (that should be leading to #1, above)?

Here is an example of how you might set this up

SAMPLE WORK PLAN

OVERVIEW: (This is only a sample! Your timeline may be much longer. However, your work must be complete by June 30, 2017.)

Activity /Phase	Who responsible	Timeline	Inputs (including partners)	Costs	Measurable outputs	Outcomes/impacts
ID and verify need ¹ through review and community input	YZ (designated point person from community) and AB (consultant)	July – Sept 2016	Consultant; announcements of project and place and time for community discussion – facilitator? Note taker	X hours of consultant time; costs associated with bringing community together including mailings, facilities/equipment rentals, etc.	Fliers, other announcements: meeting of 40 community members; Documentation of need; comments from community	Verification of need; community awareness of need and how it ; beginnings of buy-in
Draft/revise ordinance	YZ and AB	September 2016	Comments from community; AB time	X hours of consultant time	Draft of ordinance	
Community comment on proposed draft	YZ	September-Oct 2016	Consultant time; announcements of place and time for community discussion; facilitator? Note-taker	X hours of consultant time; costs associated with bringing community together including mailings, facilities/equipment rentals, etc.	Fliers, other announcements: meeting of 40 community members; Documentation of comments from community	Public knowledge of text and intent of regulation; Public and political will for regulation
Final writing of ordinance and ballot proposal	YZ and AB	October – Nov 2016	Comments from community; AB time	X hours of consultant time	Ballot-ready proposal	
Place on ballot	YZ	Nov-Dec 2016	AB time	X hours of consultant time	Proposal on ballot	Documentation of will
Ordinance passes	Voters	March 2017	More community discussion, letters to the editor	If needed, costs for bringing community together for more discussion	Letters to the editor, 40 members of community	Ability for home-sharing

Intermediate Goal/Outcome 1: Need/desire for home-sharing is verified

Activity	Who responsible	Timeline	Inputs (including partners)	Costs (for grant and cash-match)	Measurable outputs	Outcomes/impacts
Review current ordinances to determine status of home-sharing reg (existing to be revised or new to be created?)	YZ (designated point person from community) and AB (consultant)	July 2016	Existing zoning regulations	X hours of consultant time	Knowledge of current ordinances	Confirmation of what needs to be done – revise or create? (based on current knowledge of topic)
Announcement of grant for project, project premise, intended outcomes, timeline	YZ	July 6	Staff for Press releases written for local paper, community newsletters and website	None (staff time)	X press releases; Y announcements in community newsletters; Announcement on website	Community aware of project
Community discussion of program and need for shared home reg	YZ	July – Sept 2016	Event planning (when, where, logistics, food, flip charts, chairs, etc.) Announcements; letters to editor; community invitations to discussion event Announcements; letters to editor; community invitations to discussion event	Costs related to event, eg facilities/equipment rental, food, costs of printing announcement fliers, handouts at event	X number of people at event; y number of fliers sent to community members; z number of public announcements; letters to editor	Verification of need and desire for reg; comments related to how reg shaped
Summary report of community input is published	YZ or AB	Within 5 days of meeting	Notes from community meeting	X hours of consultant time, if applicable	Report published in local paper, community newsletters and website	Community-side knowledge of community thoughts and comments regarding project and proposed reg

While your project may look nothing like that in the sample, your plan **MUST** include:

- a. Description of intermediate goal/outcome for each step of plan.
 - b. Set of activities (per intermediate goal/outcome).
 - c. Per activity:
 - i. Who is responsible?
 - ii. What is timeframe?
 - iii. What activities must take place?
 - iv. What is needed for those activities? (Including specific staff or community partners.)
 - v. What are the estimated associated costs?
 - vi. What are the measurable “outputs”?
 - vii. What is the outcome or impact?
5. Please provide a **project budget** for your plan. This budget must be presented by phases (starting with the first phase) *in an excel spreadsheet* (should your application be accepted, we may ask for a copy of that spreadsheet to help us in tracking).

Here is an example of what a budget might look like, based on the tables above:

SAMPLE BUDGET:

Outcome	Activity	Component	Est cost	subtotal	MTAG	match
1	Review current regs	Consultant	4 hrs x \$125 per hr	\$500	\$500	
	Public announcements of grant and program	Staff time to write	none			
	Community discussion	Space and equipment	\$200	\$500	\$500	
	“	Staff to Write Press releases to announce in newspapers and website; create marketing materials and handouts	none			
	“	Print posters	\$300	\$300	\$300	
	“	Print and mail cards to each household	\$2000	\$2000	\$1500	\$500
	“	Handouts	\$	\$100	\$100	
	“	Food for event	\$50	\$50	\$50	
	Summary report written and published	Consultant	4 hrs	\$500	\$500	
				\$3950	\$3450	\$500

THIS IS ONLY A SAMPLE

AND MAY HAVE NOTHING TO DO WITH YOUR REALITY

Remember:

- At least 5% of your funds from Plan NH for this program **must** be spent on the community engagement piece. Here, it is considerably more. It is up to you to determine how much you need.
- All of your 25% match funds **must** be expended before the final 25% of the MTAG funds.

6. Please provide documentation

- a. To verify need (if you already have it – e.g., Master Plan, discussion sessions).
- b. Of readiness to proceed:
 - i. Of pledge or actual cash match
 - ii. Of support from your Select Board, Planning Board and/or other key decision-makers or relevant organizations/individuals
- c. Of qualifications of your technical assistance consultant.

Please combine all of the above information into **one PDF file** and send, via Dropbox, to info@plannh.org
no later than 5:00 PM April 4, 2016.

SCORING CRITERIA

Criteria	Possible points
Supports demonstrated community plan or need	0-25
Outreach plan	0-20
Clarity of Scope of Work/strength of how the use of this grant will help achieve the desired outcome(s)	0-25
Readiness to proceed (e.g. studies, outreach already done?)	0-15
Broad community support (e.g. letters of support)	0-15
Total possible points	100

APPLICATION CHECKLIST

- Cover page (see page 9 for specifics to include)
 - Authorized signature
- Narrative (3-5 pages) (see pages 9-10 for specifics to include)
- Community outreach and engagement plan narrative
- Workplan
 - Overall
 - Each intermediate goal/outcome
- Budget
 - Outreach and engagement is at least 5% of MTAG funds requested
- Documentations:
 - Verification of need
 - Readiness to proceed
 - cash match
 - letters of support
 - Qualifications of consultant(s)

**Plan NH's Municipal Technical Assistance Grant Program
FREQUENTLY ASKED QUESTIONS**

1. Q. Can a consultant apply for a Municipal Technical Assistance Grant to assist a municipality?
A. No, only incorporated New Hampshire cities and towns are eligible to apply.

2. Q. What may the funds be used for?
A. The funds are for competitive grants for cities and towns who wish to increase housing options for households with diverse needs and income levels.

The funds may be used to pay a consultant (or regional planning commission) for technical assistance in reviewing, revising or creating zoning regulations or related as they related to housing options. In addition, at least 5% of the funds **must** be used for community outreach and engagement.

3. Q. What kinds of projects might qualify?
A. Provided they are intended to increase housing options, eligible projects may include - but are not limited to - the following:
- Form-based codes;
 - Mixed-use zoning;
 - Regulatory Review. A municipality may apply for a grant to conduct a “regulatory review,” the purpose of which is to identify aspects of the municipality’ regulations that need to be amended to increase options for places to live for households with diverse needs and income levels.
 - Inclusionary zoning and workforce housing solutions. Inclusionary zoning is defined in NH RSA 674:21 and can help a community fulfill its obligations under the NH Workforce Housing Law, RSA 674:58-61.
 - Lot-size averaging;
 - Village plan alternative zoning and subdivision regulations;
 - Regulatory standards promoting infill development;
 - Growth boundaries intended to maximize efficiency of infrastructure;
 - Transfer of development rights and density transfer credit codes;
 - Neighborhood heritage districts;
 - Building codes for energy-efficient rehabilitation of older structures;
 - Corridor planning to increase mixed-income housing near employment nodes;
 - Pedestrian- and transit-oriented development and affordable housing;
 - Economic development connecting housing and transportation investments; and
 - Community Revitalization Tax Relief Incentive, RSA 79-E.

- Analysis of ordinances and regulations for workforce (or other) housing's economic viability.

4.. Q. May we apply for assistance in writing a housing chapter for our Master Plan?

A. No. These funds are specifically for technical assistance in reviewing, re-writing or creating zoning regulations or ordinances (related to housing). As mentioned above, you may want to do this in support of/to meet the goals of your existing/current housing chapter.

5 Q. Is there any way we can find out if a project may be eligible for consideration before we dive into the whole application process?

A. Yes. You are welcome to write a brief description and send it to us with any questions you might have. This will not add to or detract from your score.

6. Q. In the application, what do you mean by “supporting a demonstrated plan or need?”

A. Providing different types of places to live is good for individuals, but it is also good for your overall community. Economic development, job creation, choices in how to get about - these all depend on having a variety of home locations and styles. If your community already has an economic development plan, for example, how can this project support that?

Is there a relevant section of your Master Plan that this project supports?

And/or: your community's demographic profile or income range may mean that certain types and locations of homes are necessary – but not yet possible.

7. Q. Our municipal planner spent a lot of time last year on a regulatory review. Can we use grant funds to offset that cost if part of the grant will be used in support of establishing regulations based on those findings?

A. No. Grant funds can only be used to pay for consultant services provided in support of a MTAG Program-approved project, not any expenses incurred prior to grant award.

8. Q. We have an established relationship with a consultant who has worked extensively for my community in the past. Do we have to put grant-funded work out to competitive bid?

A. The MTAG Program does not require a competitive bidding process. Your municipality, however, must have its own procurement policies that must be followed.

The qualifications of your consultant *must* be included in your application.

9. Q. Can two or more towns share an MTAG Program Grant?
- A. Yes, as long as the grant will be administered by a single municipality. Note that *no matter the number of municipalities within one application, the funding limits (\$2500 - \$10,000) are per application, regardless of number of municipalities per application.*
10. Q. If my community receives an MTAG Grant but finds that it can't spend the entire award, what should we do?
- A. Contact the MTAG Administrator at Plan NH as soon as possible.
11. Q. Can we use staff salaries used in support of the MTAG project to fulfill the cash match requirement?
- A. No. The 25% cash match must be demonstrated to be in the form of a grant, municipal funds or other source of funding which have been given directly to the municipality and shall be used as payment for consultant services, supplies, or other costs directly associated with the project ***excluding*** staff salaries and wages.

Any other inquiries may be directed to Robin LeBlanc at Plan NH

R_leblanc@plannh.org 603-452-7526